

**BRING THIS INFORMATION WITH YOU FOR YOUR TAX APPOINTMENT!**

- Military identification cards/Photo ID
- Social Security cards for you, your spouse and dependents (ITIN, ATIN, Medicare card, or SSA-1099, verification letter issued by the Social Security Administration)
- Birthdates for all people who appear on the return
- If filing joint, both members must be here, 100% ID check before return is begun. If one taxpayer needs to leave they can return later to sign (Will not e-file until both sign)
- If one spouse is deployed, need IRS form 2848 or power of attorney
- If divorced or separated and claiming a dependent that does not live with you bring divorcee decree (2008 or before), 2009 and after must have signed form 8332 from custodial parent
- W2s, W2-G, 1099R, 1099-Misc from all employers
- 1099 INT, 1099 DIV (If you had interest, dividends or capital gains) Dec bank statements showing year to date interest
- **Copy of last year's federal tax return and if you live in Iowa you MUST bring last year's Iowa return**
- **Bank information with routing & account number (voided check preferred, NO deposit slips)**
- Child care expenses (Must include name, address & tax ID of provider)
- Forms 1095-A, B or C, Affordable Health Care Statements
- Educator Expense: (Teacher, counselor, principal K-12 grade)
- If paying on student loan, need document showing interest paid
- 1098T (If you had college education expenses)
- **Contributions to an IRA (Traditional or Roth): you need to know which kind and how much you contributed in 2014.**
- December LES
- Charitable contributions, personal property tax on vehicles (pink slip/registration slip)
- If sold stock or mutual funds, **need cost basis** for shares sold (1099-B)
- If you own your home: the mortgage interest, real estate taxes paid and other pertinent documents. If you purchased the home or refinanced in 2014 bring your HUD-1 statement
- If you took the first-time homebuyer credit, (interest free loan) in 2008 for \$7,500, you began paying it back on your 2010 tax return and will continue to repay the \$500.00 until 2025 unless you PCS'ed.
- If you paid alimony: you need to have the SSN of who received it and how much you paid.
- If you received alimony you need to know the amount you received.
- Home business – income, **expenses can be no more than \$10,000**, must meet VITA rules for us to complete return. Ask about this when you call to set up your appointment.
- Self-employed – 1099 Misc and all expenses, but not more than \$10,000 in expenses.
- Rental income/expenses, ie: insurance, mortgage interest, real estate taxes, repairs, management fees, travel, advertising, HOA, depreciation amounts etc.....
- Any other documentation for income or deductions not mentioned above.
- **Dependent children need to schedule their own tax appointments and be here to complete them.**

**MUST BRING LAST YEARS TAX RETURN ~ FEDERAL AND STATE ~ IF YOU DO NOT BRING THEM WE WILL ASK YOU TO RESCHEDULE.**

Updated 11-28-2014